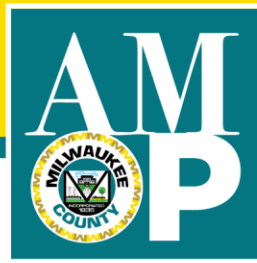


02.06.09 New Employee Orientation – Pension Enrollment



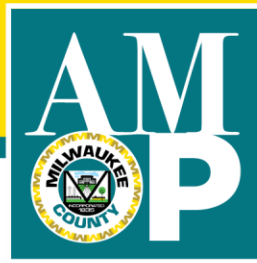
Why This Procedure Is Important

To provide documentation regarding the new employee orientation process as it relates to pension enrollment. This will equip members of the Employees' Retirement System (ERS) of Milwaukee County with the knowledge to complete their pension enrollment and beneficiary forms when going through the new employee orientation process



To Whom Does This Procedure Apply?

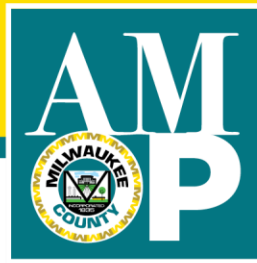
*All Milwaukee County pension-eligible employees hired before
January 1, 2025*



Here Is What the Procedure Says:

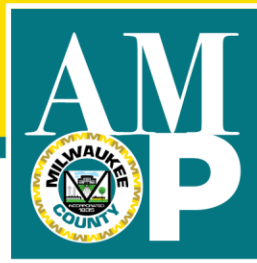
Step 1: Attend New Employee Orientation and View Virtual Pension Orientation Materials

- During the new employee orientation, the member will be provided a brief overview the benefit that ERS members are eligible for and instructions on how to complete the virtual orientation for their pension benefits.
- Members can access the Virtual New Employee Orientation Presentations for the pension system on the Retirement Plan Services County Connect site. On that site, there are two video that provide an overview of the pension benefit and explain how to complete the ERS Enrollment Forms.
- Members can print the Pension Enrollment Form and, if necessary, the Beneficiary Designation Addendum and Reciprocity forms directly from the RPS intranet site.



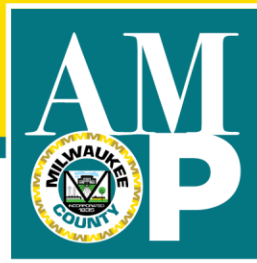
Step 2: Print and Complete the Pension Enrollment Form

- While enrollment into the ERS is mandatory and not dependent on completion of the Pension Enrollment form, the form allows members to acknowledge their participation in the ERS pension system, designate beneficiaries, and indicate if they have any previous pension service with Milwaukee County, the City of Milwaukee, or the State of Wisconsin retirement systems.
- To complete the first page of the two-page enrollment form, members should fill out the following:
 - Add their demographic information at the top of the form.
 - If the employee is NOT eligible for ERS membership, the checkbox in the middle of the form should be checked to acknowledge their ineligibility for ERS.
 - Eligible ERS members should leave this checkbox unchecked.
 - If the member has service from the County of Milwaukee, City of Milwaukee, or State of Wisconsin, they should complete the box near the bottom of the form to declare prior pension service.
 - If a member previously participated in the City of Milwaukee or State of Wisconsin retirement systems, they need to complete the additional Reciprocity form described later in this procedure.
 - Members should sign and date the bottom of the first page.



Step 3: Designation of Pension Beneficiaries

- On the second page of the two-page enrollment form, members can designate beneficiaries for two benefits payable in the event of their death prior to becoming vested in the pension system. Both a \$2,000 lump sum death benefit and a refund of membership contributions may be payable to a beneficiary in the event of a member's passing.
 - The \$2,000 lump sum death benefit and the refund of membership contributions can be divided among multiple beneficiaries. If the member would like to divide among multiple beneficiaries, they will need to indicate what percentage each beneficiary should receive. These shares must add up to 100%.
- If the member would like to name additional beneficiaries or contingent beneficiaries, they can complete the Beneficiary Designation Addendum form that is also printable from the RPS intranet site.
 - A contingent beneficiary would receive a benefit if a member's primary beneficiary is deceased when the benefit is payable.
- Beneficiaries for the \$2,000 lump sum death benefit and the refund of membership contributions can be changed at any time prior to a member's retirement or death.



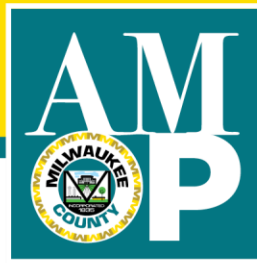
Step 4: Declare Prior Service with City of Milwaukee and State of Wisconsin Retirement Systems

- If the member has prior service from the City of Milwaukee or State of Wisconsin retirement systems, an additional Reciprocity form should be completed. The Reciprocity form authorizes the Milwaukee County, the City of Milwaukee, and the State of Wisconsin retirement systems to disclose information to one another regarding a member's employment, dates of service, military service, vested status, and years of creditable service in each system.
- If the member was covered under more than one of the aforementioned systems, reciprocity may:
 - Allow vested service earned under the previous retirement system to count toward the vesting requirement in your new system.
 - Increase your retirement benefit earned under the previous system.
- Members should contact RPS for additional information on how reciprocity may affect their benefit from the ERS.



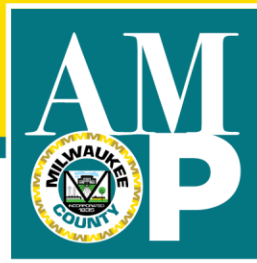
Step 4: Return the Enrollment Forms to RPS

- Members should return the completed Pension Enrollment Form and, if necessary, the Beneficiary Designation Addendum and Reciprocity forms to RPS.
- The forms can be mailed directly to RPS at the following address:
**Milwaukee County RPS
Courthouse Room 210-C
901 North 9th Street
Milwaukee, WI 53233**
- Alternatively, the forms can be submitted via email to ERS@milwaukeecountywi.gov.



Quiz Questions?

After reviewing the Procedure, you will be asked the following questions to complete the training:



True of False

ERS members must complete an Enrollment form in order to earn a benefit in the ERS pension plan.



**Although enrollment is automatic into ERS,
which forms are the member recommended to
return to RPS in this AMOP?**

- A. Pension Enrollment Form***
- B. Beneficiary Designation Addendum, if applicable***
- C. Reciprocity, if applicable***
- D. All the above***



True of False

If a member worked in previous positions at Milwaukee County, the City of Milwaukee, and the State of Wisconsin retirement systems, that service may be eligible for reciprocity.